

WEEK 1: BE VISIBLE AND GET THE LAY OF THE LAND

- Orientation (tour clinic, get keys, order business cards, etc.)
- Clinic systems trainings (human resources, EHRs, etc.)
- Learn to use new pager and/or cellphone (if applicable)
- Setup voicemail, email, instant messaging, etc.
- Add contact information to provider roster and all medical staff email group lists
- Post list of staff and PCP contact numbers at your workstation
- Meet everyone in the clinic (if possible), ask about their duties if you are not sure
- Schedule meetings clinic manager, lead RN, supervisor
- Meet or schedule meetings with senior leadership
- Obtain list of clinic meetings and determine which to attend regularly
- Stay late one day, observe the afterhours situation
- Draft BHC services brochure; after approval, copy and distribute (see Chapter 9)
- Draft BHC Services Announcement poster; after approval, copy and post (see Figure 10.2)
- Draft educational handout; *GATHER: The Essentials of Primary Care Behavioral Health* (see Figure 10.3)
- Study PCBH program manual, or draft a manual if one has not already been made; pass along to leadership
- Craft and memorize the BHC introduction for initial visits (see Chapter 9, Table 9.1, Figure 9.3)
- Read *Behavioral Consultation and Primary Care* (Chapters 2, 5, 6) to learn about the PCMH team and the Core Competency Tools for BHCs, PCPs and RNs
- Assess skill level on the BHC Core Competency Tool, clarify training needs with supervisor or mentor
- Meet or talk by phone with a BHC working in a similar PC setting (shadow if possible)
- Meet with scheduling staff to discuss how to develop schedule template
- Work with clinic management concerning scheduling processes
- Develop fact sheet for PCPs and RNs about connecting patients with BHC services (see Figure 10.4)
- Work with Information Technology Staff to form BHC template (see Chapter 9, Figure 9.7)
- Clarify the billing plan (or start to develop one, if needed)
- Shadow several PCPs and a RN for part of a day (use a BHC Shadowing Note Sheet, Figure 10.5)

<ul style="list-style-type: none"> • Draft survey for PCPs: What problems do they most desire help with (see Figure 10.6)
<ul style="list-style-type: none"> • Form a BHC Team, set meeting time
<ul style="list-style-type: none"> • Visit or call important social service organizations that you are likely to use
<p>WEEK 2: BEGIN PATIENT CARE AND CONTINUE SERVICE PLANNING</p>
<ul style="list-style-type: none"> • Begin seeing patients (See every patient referred)
<ul style="list-style-type: none"> • Remind PCPs to interrupt as needed for same-day appointments
<ul style="list-style-type: none"> • Practice selected behavioral health measure scoring to improve speed
<ul style="list-style-type: none"> • Practice Life Context and Functional Analysis questions in role plays and with patients
<ul style="list-style-type: none"> • Check quality of first chart notes using PCBH Chart Review Tool (see Chapter 9)
<ul style="list-style-type: none"> • Walk through the halls every hour when not busy with a patient
<ul style="list-style-type: none"> • Distribute handout for staff to introduce yourself and the BHC service (provide copies of BHC brochure, too) (see Figure 10.2)
<ul style="list-style-type: none"> • Consider what groups or classes you might start in response to PCPs response to survey; discuss with others
<ul style="list-style-type: none"> • Consider what pathways you might propose in response to PCP response to survey; discuss with others
<ul style="list-style-type: none"> • Speak at a provider meeting (if there is one) and provide an update
<ul style="list-style-type: none"> • Shadow more PCPs
<ul style="list-style-type: none"> • In free moments, read <i>Behavioral Health in Primary Care: A Practitioner's Handbook</i> (Hunter, Goodie, Oordt, & Dobmeyer, 2009) to learn more about clinical interventions for common problems in PC
<ul style="list-style-type: none"> • Meet or talk by phone with a more experienced BHC colleague (discuss survey results, questions, CC Tool skill development targets)
<ul style="list-style-type: none"> • Talk with interpreters about BHC services
<ul style="list-style-type: none"> • Reflect on how your work with support staff is going
<ul style="list-style-type: none"> • Talk with referral manager and explore affiliated specialty MH service (if applicable)
<ul style="list-style-type: none"> • Talk with representatives from schools in the area; provide copies of BHC brochure
<p>WEEK 3 AND BEYOND: BE A TEAM PLAYER AND A TEACHER</p>
<ul style="list-style-type: none"> • Attend clinic huddles
<ul style="list-style-type: none"> • Use “Request of the Week” communication strategy at huddles (Figure 10.7)

<ul style="list-style-type: none"> • Offer to preview schedules with PCPs to identify warm-handoffs, particularly with PCPs who use BHC less
<ul style="list-style-type: none"> • Continue to shadow PCPs when free
<ul style="list-style-type: none"> • Develop needed or requested patient education materials
<ul style="list-style-type: none"> • Schedule standing time in provider and staff meetings
<ul style="list-style-type: none"> • Coach PCPs and RNs on what to say to patients about BHC services (see Figure 10.8)
<ul style="list-style-type: none"> • Push for increased variety in types of referrals from all PCPs & RNs (see Figure 10.9)
<p>WEEK 4 AND BEYOND: EXPAND AND EVALUATE</p>
<ul style="list-style-type: none"> • Develop a behavioral health newsletter to distribute regularly to staff and PCPs
<ul style="list-style-type: none"> • Conduct pilot studies of an initial PCBH Pathway
<ul style="list-style-type: none"> • Develop psychoeducational classes or group visits
<ul style="list-style-type: none"> • Spend another day with an experienced BHC with a plan of observing a class or clinical pathway activity
<ul style="list-style-type: none"> • Prepare to respond to staff requests for help
<ul style="list-style-type: none"> • Discuss ways the BHC can assist management
<ul style="list-style-type: none"> • Administer the BARRIERS to Using the BHC (BUB) Questionnaire (Figure 10.10)
<ul style="list-style-type: none"> • Administer the BARRIERS to Same-day Services (BUS) Questionnaire (Figure 10.11)
<ul style="list-style-type: none"> • Evaluate and evolve the program

Figure 10.1. The BHC Start-Up Checklist.